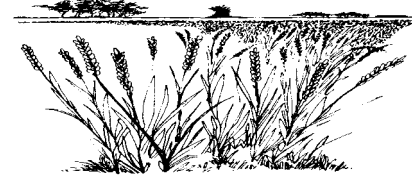


California Field Crop Review



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WHEAT FORECAST

California farmers are expected to produce 698 thousand tons of winter wheat in 2004, up 3 percent from last year. The 310 thousand acres expected to be harvested for grain is 16 percent below last year. The yield is expected to average 2.25 tons per acre, 23 percent above last year.

California's Durum wheat production is forecast at 315 thousand tons, down 9 percent from 2003. Acreage expected for harvest, at 105 thousand, is 9 percent below last year's acreage. The expected yield of 3.00 tons per acre remained the same as the previous year.

United States winter wheat production is forecast to be 46.5 million tons, down 9 percent from 2003. Based on conditions as of May 1, the U.S. yield is expected to average 1.33 tons, 5 percent below May 2003. Harvested acreage was estimated at 35.1 million acres, down 4 percent from last season.

The U.S. estimate for Durum wheat production for states other than Arizona and California will not be available until July 12, 2004.

WHEAT FORECAST

Crop and Location		Area Harvested		Yield		Production	
		2003	2004	2003	2004	2003	2004
		1,000 Acres		Tons		1,000 Tons	
WINTER	California	370	310	1.83	2.25	677	698
	UNITED STATES	36,541	35,082	1.40	1.33	51,212	46,512
DURUM	California	115	105	3.00	3.00	345	315
	Arizona	115	105	3.00	3.00	345	315
	UNITED STATES	2,869	a/	1.01	b/	2,899	b/

a/ Published June 30, 2004. b/ Published July 12, 2004.

2003 COTTON PRODUCTION

California farmers produced 1.50 million bales (480-lb. net weight) of Upland cotton in 2003, 2 percent more than the 1.46 million bales produced in 2002. Harvested acreage, at 545 thousand, was 14 percent above the 477 thousand harvested the previous year. The average yield was 1,317 pounds per acre, 152 pounds below 2002.

began the harvest later than any of the previous 15 years due to the late-developing crop. October weather provided ideal harvesting conditions throughout California. Growers were wrapping up the harvest by the end of November.

American-Pima production in California totaled 371 thousand bales, down 39 percent from the 603 thousand bales produced the previous year. Harvested acreage, at 149 thousand, was 29 percent below the 209 thousand harvested in 2002. The average yield was 1,194 pounds per acre, 192 pounds below the previous year. The growers planted their crop during March, but were delayed or forced to replant due to the cool, wet spring weather. Some growers switched from American-Pima varieties to Upland varieties due to more favorable Upland prices. Development of the cotton crop was up to a month behind normal, but the extremely warm summer weather allowed the crop to catch up. Growers

All cotton production in the United States totaled 18.2 million bales, up 6 percent from the 2002 production. Upland cotton production is estimated at 17.8 million bales, 8 percent more than the previous year. American-Pima production totaled 432 thousand bales, down 36 percent from 2002.

The U.S. yield for Upland cotton is a record-high 723 pounds per acre, 71 pounds more than 2002. Harvested area decreased 3 percent to 11.8 million acres. The U.S. Pima yield is estimated at 1,170 pounds per harvested acre, 172 pounds less than last year's record-high yield. Producers planted 179 thousand acres of Pima cotton in 2003, down 27 percent from 2002.

COTTON AND COTTONSEED

Commodity Item		Unit	CALIFORNIA		UNITED STATES	
			2002	2003 1/	2002	2003 1/
UPLAND COTTON:	Acres Planted	1,000 Acres	480.0	550.0	13,714.0	13,301.0
	Acres Harvested	1,000 Acres	477.0	545.0	12,174.0	11,826.0
	Yield	Lbs./Acre	1,469.0	1,317.0	652.0	723.0
	Production 2/	1,000 Bales	1,460.0	1,495.0	16,530.3	17,822.9
	Price 3/ 4/	Cents/Lb.	57.3	77.3	44.5	62.9
	Value 5/	1,000 Dollars	401,558.0	556,560.0	3,497,123.0	5,345,209.0
AMERICAN-PIMA COTTON:	Acres Planted	1,000 Acres	210.0	150.0	243.9	178.6
	Acres Harvested	1,000 Acres	209.0	149.0	242.6	177.4
	Yield	Lbs./Acre	1,386.0	1,194.0	1,342.0	1,170.0
	Production 2/	1,000 Bales	603.3	370.5	678.3	432.3
	Price 3/ 4/	Cents/Lb.	86.0	116.0	86.0	115.0
	Value 5/	1,000 Dollars	249,042.0	206,016.0	280,009.0	236,410.0
COTTONSEED:	Production	1,000 Tons	731.0	680.0	6,183.9	6,664.6
	Sales to Oil Mills	1,000 Tons	81.0	93.5	3,287.9	3,383.6
	Other Farm Disposition 6/	1,000 Tons	650.0	586.5	2,896.0	3,281.0
	Used for Planting 7/ 8/	1,000 Tons	6.0	6.5	135.7	143.9
	Price 3/ 4/	Dollars/Ton	138.0	156.0	101.0	117.0
	Value 5/	1,000 Dollars	100,878.0	103,272.0	616,352.0	784,166.0
	Value of Sales to Oil Mills	1,000 Dollars	11,178.0	14,586.0	332,077.9	395,881.2

1/ Revised 2003 data. Net weight bales are 480 lbs. 2/ Production ginned and to be ginned. 3/ Marketing year average price. 4/ The 2003 data is an average to January 1, 2004. 5/ Based on marketings and monthly prices received from August 1, 2003 - December 31, 2003. 6/ Includes planting seed, feed, exports, inter-farm sales, shrinkage, losses, and other uses. 7/ Included in "other" farm disposition. Planting seed from previous year's crop. 8/ Revised 2002 data.

CALIFORNIA FIELD CROP PRICES - APRIL 2004

Mid-April prices received by California farmers increased from March for dry edible beans, all potatoes, winter and fall potatoes, and all types of hay. Mid-month prices for wheat and Upland cotton lint were not published to avoid possible disclosure of individual operations. There were insufficient sales to establish a mid-month price for barley. Prices were above a year earlier for dry edible beans, all potatoes, winter potatoes, fall potatoes, and all types of hay.

U.S. PRICES RECEIVED INDEX UP THREE POINTS

The preliminary All Farm Products Index of Prices Received by Farmers in April at 124, based on 1990-92=100, is three points (2.5 percent) above the March Index. This is the highest index level since records began. The Livestock Products Index increased four points (3.3 percent) from March, while the All Crops Index increased two points (1.7 percent). Producers received higher commodity prices for milk, cattle, corn, and lettuce. Lower prices were received for eggs, strawberries, hogs, and tobacco. The seasonal changes in the mix of commodities farmers sell, based on the past 3-year average, also affect the overall index. Increased average marketings of cattle, milk, strawberries, and sweet corn offset decreased marketings of soybeans, corn, cotton, and hogs. The preliminary All Farm Products Index is up 23 points (23 percent) from April 2003.

The April All Crops Index is 122, up 1.7 percent from March and 11 percent above April 2003. From March, index increases for potatoes and dry beans, commercial vegetables, and feed grains and hay more than offset the index decreases for tobacco, fruits and nuts, and food grains.

The April Food Grains Index, at 124, is 0.8 percent below the previous month, but 25 percent above April 2003. The April all wheat price, at \$127.33 per ton, is down 67 cents from March, but \$15.00 above April 2003.

The April Feed Grains & Hay Index is 124, up 5.1 percent from last month and 16 percent above April 2003. The corn price, at \$102.50 per ton, is up \$4.29 from last month and \$18.93 above April 2003. The all hay price, at \$89.60 per ton, is \$7.80 above March, but \$3.30 below last April. Grain sorghum, at \$4.96 per cwt., is up 11 cents from March and \$1.00 above April of last year.

The April Potatoes & Dry Beans Index, at 122, is up 16 percent from last month and 5.2 percent above April 2003. The all potato price, at \$7.19 per cwt., is up \$1.10 from March and 25 cents above last April. The all dry bean price, at \$21.10 per cwt., is unchanged from the previous month, but \$2.40 above April 2003.

The April Cotton Index, at 98, is unchanged from March, but 31 percent above April 2003. The April price, at 59.5 cents per pound, is up 0.1 cents from the previous month and 14.1 cents above last April.

AVERAGE FARM PRICES RECEIVED BY FARMERS 1/

Commodity	Unit	CALIFORNIA			UNITED STATES		
		April 2003	March 2004	Apr. 15, 2004	April 2003	March 2004	Apr. 15, 2004
		Dollars					
Corn <u>2/</u>	Ton	---	---	---	83.57	98.21	102.50
Wheat <u>2/</u>	Ton	<u>3/</u>	<u>3/</u>	<u>3/</u>	112.33	128.00	127.33
Oats <u>2/</u>	Ton	---	---	---	123.75	101.25	101.88
Barley <u>2/</u>	Ton	<u>3/</u>	<u>3/</u>	<u>4/</u>	118.75	116.25	113.75
Sorghum Grain <u>2/</u>	Cwt.	---	---	---	3.96	4.85	4.96
Rice <u>2/</u>	Cwt.	---	---	---	4.61	8.01	7.90
Dry Edible Beans <u>2/</u>	Cwt.	32.20	36.30	37.90	18.70	21.10	21.10
All Potatoes <u>5/</u>	Cwt.	19.50	21.70	25.80	6.94	6.09	7.19
Winter	Cwt.	29.00	28.40	31.80	---	---	---
Spring	Cwt.	---	---	---	---	---	---
Summer	Cwt.	---	---	---	---	---	---
Fall	Cwt.	7.95	9.90	10.40	---	---	---
All Hay, Baled	Ton	98.00	104.00	109.00	92.90	81.80	89.60
Alfalfa Hay, Baled	Ton	99.00	105.00	110.00	96.50	85.90	92.70
Other Hay, Baled	Ton	85.00	93.00	94.00	79.50	70.90	76.00
Upland Cotton Lint <u>2/</u>	Lb.	<u>3/</u>	0.702	<u>3/</u>	0.454	0.594	0.595
Cottonseed	Lb.	---	---	---	---	---	---

1/ The estimated prices shown in the table represent composite average prices received by farmers. They are averages for all grades, classes, and methods of sale of each commodity for the State and U.S. as a whole.

2/ Previous month revised to monthly average.

3/ Not published to avoid possible disclosure.

4/ Insufficient sales to establish a price

5/ Monthly average.

INDEX NUMBER OF PRICES RECEIVED AND PRICES PAID BY FARMERS, UNITED STATES

Index	1910-14 = 100			1990-92 = 100		
	April 2003	March 2004	April 2004	April 2003	March 2004	April 2004
Prices Received - Unadjusted						
All Farm Products	640	768 <u>1/</u>	787	101	121 <u>1/</u>	124
All Crops	543	593 <u>1/</u>	600	110	120 <u>1/</u>	122
Food Grains	316	397 <u>1/</u>	394	99	125 <u>1/</u>	124
Feed Grains and Hay	381	421 <u>1/</u>	442	107	118 <u>1/</u>	124
Cotton	384	502 <u>1/</u>	503	75	98 <u>1/</u>	98
Potatoes and Dry Edible Beans	589	533 <u>1/</u>	617	116	105 <u>1/</u>	122
Prices Paid by Farmers for Commodities, Services, Interest, Taxes and Wage Rates <u>2/</u>	1,699	1,767 <u>1/</u>	1,776	128	133 <u>1/</u>	133
Parity Ratio <u>3/</u>	38	43 <u>1/</u>	44	79	91 <u>1/</u>	93

1/ Revised.

2/ All production indexes as of 15th of month.

3/ Ratio of Index of Prices Received by Farmers to Index of Prices Paid, Interest, Taxes and Farm Wage Rates.

SPRING POTATOES

California's spring production, at 6.65 million cwt., is down 3 percent from last month's forecast and 20 percent less than a year ago. The spring crop is reported to be in very good condition overall, with ideal weather contributing to rapid development. Many growers anticipate an earlier than usual harvest.

Nationally, the 2004 spring production is forecast at 19.1 million cwt., down 3 percent from the April forecast and 22 percent below last year. Area for harvest is estimated at 71.7 thousand acres, down 1 percent from the April estimate and 15 percent below last year. The average yield is forecast at 266 cwt. per acre, down 5 cwt. from last month and 22 cwt. below a year ago.

SPRING POTATOES

State	Area Harvested		Yield		Production		
	2003	2004	2003	2004	2002	2003	2004
	1,000 Acres		Cwt.		1,000 Cwt.		
Arizona	7.6	6.2	275	285	2,106	2,090	1,767
California	19.0	17.5	440	380	7,695	8,360	6,650
Florida	28.6	22.5	280	249	7,381	8,008	5,605
Hastings	20.3	16.0	280	265	5,775	5,684	4,240
Other	8.3	6.5	280	210	1,606	2,324	1,365
North Carolina	17.0	15.0	175	190	3,230	2,975	2,850
Texas	12.5	10.5	240	210	2,040	3,000	2,205
UNITED STATES	84.7	71.7	288	266	22,452	24,433	19,077

MAY 1 FALL POTATO STOCKS

California's fall potato stocks were estimated at 1.20 million cwt. as of May 1, 2004. Stocks represented 35 percent of the fall production.

The 15 major potato States held 84.8 million cwt. of potatoes in storage May 1, 2004, up 2 percent from last year and 4 percent above 2002. Potatoes in storage account for 21 percent of the 2003 fall storage States' production, up 1 percent from last year.

Disappearance of 319 million cwt. of potatoes is down 2 percent from last year, but 4 percent above two years ago. Shrink and loss, at 27.0 million cwt. so far this season, is up 5 percent from last year and 8 percent above two years ago. This disappearance and loss includes unmarketable Maine potatoes disposed of through the Natural Resources Conservation Service's Environmental Quality Incentives Program.

Processors used 154 million cwt. of 2003 crop potatoes so far this season, down 3 percent from a year ago, but 4 percent above two years ago. April usage of 16.7 million cwt. is 2 percent above last year and up 1 percent from two years ago. Dehydrators used 34.6 million cwt. to date, down 4 percent from last year.

Western States held 59.3 million cwt. of potatoes in storage on May 1, down 6 percent from last year and 5 percent below two years ago. Idaho's potato stocks are down 3 percent from last year, Washington decreased 9 percent, and Colorado's storage held 38 percent less. Potato sheds in Oregon stored 10 percent more than last year, California increased 20 percent, and Montana's storage gained 25 percent.

MAY 1 FALL POTATO PRODUCTION AND STOCKS 1/

State	Crop of 2002			Crop of 2003		
	Production	Total Stocks May 1, 2003 2/	Percent of Production	Production	Total Stocks May 1, 2004 2/	Percent of Production
	1,000 Cwt.		Percent	1,000 Cwt.		Percent
California 3/	4,316	1,000	23	3,444	1,200	35
Colorado	27,885	5,800	21	23,652	3,600	15
Idaho	133,385	34,500	26	123,180	33,500	27
Maine	16,960	3,900	23	17,030	4,100	24
Michigan	13,878	1,000	7	15,015	1,600	11
Minnesota 3/	18,810	4,300	23	22,330	5,500	25
Montana	3,224	400	12	3,339	500	15
Nebraska	8,611	---	---	9,860	---	---
New York	5,500	---	---	6,510	450	7
North Dakota	23,460	5,500	23	27,440	8,300	30
Ohio 3/	902	---	---	1,290	---	---
Oregon	24,936	5,000	20	20,991	5,500	26
Pennsylvania 3/	2,128	---	---	3,915	100	3
Washington 3/	92,340	16,500	18	93,150	15,000	16
Wisconsin 3/	30,750	3,700	12	32,800	3,800	12
Other States	---	1,340	---	---	1,650	---
15-STATE TOTAL 3/	407,085	82,940	20	403,946	84,800	21

1/ Stocks include processor holdings and seed to plant 2004 potatoes. Crop seed usage for 2003 totaled 28.3 million cwt.

2/ Missing stocks are combined into "Other States."

3/ Production for 2002 revised in *Field Crops, Final Estimates 1997-2002* publication released March 17, 2004. Stocks will be revised in *Potatoes and Sweet Potatoes Final Estimates 1997-2002* publication tentatively scheduled for release August 20, 2004.

HAY STOCKS ON FARMS

Stocks of hay on California farms totaled 300 thousand tons as of May 1, 2004. This is 15 percent of the December 1 stocks and was 50 percent above May 1, 2003.

United States May 1 hay stocks totaled 25.9 million tons of hay on farms. This was 23 percent of the December 1 stocks and 17percent below May 1 of the previous year.

HAY STOCKS ON FARMS

State	December 1			May 1		
	2001	2002	2003	2002	2003	2004
	1,000 Tons					
California	1,930	1,840	2,048	228	200	300
Arizona	223	203	280	28	45	55
Nevada	776	882	857	111	167	121
Oregon	1,901	2,550	2,395	183	340	377
Utah	1,494	1,210	1,495	215	175	279
UNITED STATES	110,384	102,978	110,752	22,458	22,013	25,865

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